



## OFFICE OF PUBLIC INSTRUCTION

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Linda McCulloch  
Superintendent

May 8, 2003

To: Authorized Representatives  
IDEA Part B Projects

From: Marilyn Pearson  
Assistant Director of Special Education

Re: Application Packet for Part B and Preschool (Section 619) Allocations Under The  
Individuals With Disabilities Education Act (IDEA)

***MOE: The Final Maintenance of Effort report for state fiscal years 2001 and 2002 include any amendments that were submitted to the Office of Public Instruction (OPI) for the FY 2002 trustees' financial summary and all approved, allowable exceptions.***

***ALLOCATIONS: The U.S. Department of Education will be allocating IDEA Part B awards to states in two parts. As a result, when your Part B application is approved in June, it will only include a portion of the total amount you will receive in current-year funds. The remaining amount of current-year funds will be allocated to projects in October, along with carry-over funds from FY 2003 projects.***

***PRIVATE SCHOOLS: Questions related to private schools and students with disabilities who have been parentally enrolled in private schools have been added to the application. It is important that these questions be fully answered.***

***Application Due to the OPI: June 27, 2003***

Enclosed are the materials you will need to submit your application for IDEA Part B and Preschool funds for the FY '04 project year. Your application must be received at the Office of Public Instruction on or before June 27, 2003, to ensure there is no lapse in funding. This packet includes the following:

- Consolidated Application for Part B and Preschool Funds
- Preliminary (Estimated) Part B and Preschool Allocations Information
- Final MOE Report for FY '01 and FY '02
- IDEA Part B and Preschool Proportionate Share Calculation Forms

## I. ALLOCATIONS FOR FY '04 PROJECTS

### IDEA PART B

The IDEA Part B allocations included in this packet are based on preliminary information from the U.S. Department of Education and distributed to applicants in accord with 34 CFR 300.712. **Final allocations will be adjusted to accommodate changes in the grant award, as well as for other changes that may have occurred (e.g., change in participating districts, non-operating districts, etc.).** Allocations to applicants are based on the permanent procedure as identified in 34 CFR 300.712.

**Base Payments:** Allocations are based on the amount the LEA would have received for the base year as defined in 34 CFR 300.706. The calculation is based on the 12/1/98 child count.

**Enrollment/Poverty:** Allocations are based on the relative numbers of children enrolled in public and private elementary and secondary schools within each LEA's jurisdiction and the relative numbers of children living in poverty.

**Capacity Building:** Section 611(f)(4)(A) of IDEA provides that in any fiscal year in which the percentage increase in the state's allocation under Section 611 exceeds the rate of inflation (as measured by the percentage increase, if any, from the preceding fiscal year in the Consumer Price Index For All Urban Consumers, published by the Bureau of Labor Statistics of the Department of Labor), each state shall reserve, from its allocation under 611, the amount described in Section 611(f)(4)(B) to make subgrants to LEAs, unless the statewide amount is less than \$100,000. Capacity building funds are for the purposes of assisting LEAs in providing direct services and in making systemic change to improve results for children with disabilities. Capacity building funds have been calculated for distribution to LEAs based on the public and private school enrollment and poverty data.

**Supplemental Flow-Through:** These funds are a portion of the state's discretionary funds (part of the maximum state set-aside allowed). They are distributed to applicants as supplemental flow-through and have been calculated for distribution based on the public and private school enrollment and poverty data.

### PRESCHOOL FUNDS

Preschool allocations are distributed in accord with Section 619 (Preschool Grants) requirements and calculated as follows:

**Base Payment:** In accord with 619(g)(1), the state must distribute the amount the agency (LEA) would have received under Section 619 for fiscal year 1997 if the state had distributed 75 percent of its grant for that year under Section 619(c) (3), as then in effect. The calculation is based on each district's December 1, 1996, child count.

**Poverty/Enrollment:** The state is required to allocate 85 percent of any remaining grant funds it does not reserve under Section 619(d) or allocate under 619(g)(1)(A) to LEAs on the basis of the relative numbers of children enrolled in public and private elementary and secondary schools within the LEA's jurisdiction; and allocate 15 percent of those remaining funds to those LEAs in accordance with their relative numbers of children living in poverty. Poverty and enrollment figures for each LEA are based on data on file at the Office of Public Instruction.

**Supplemental Flow-Through:** These funds are a portion of the state's discretionary funds (part of the maximum state set-aside allowed). These funds are distributed as supplemental flow-through and calculated based on enrollment in public and private schools.

## **II. Proportionate Share Calculation for Parentally Placed Private School Children With Disabilities**

Consistent with the requirements under IDEA, each school district, including each district that participates in a special education cooperative or consortium, must calculate a proportionate share of their current-year IDEA Part B and preschool allocation of funds for special education and related services for parentally placed IDEA-eligible private school children with disabilities. In Montana, for purposes of calculating the proportionate share, private school children includes IDEA-eligible children in home schools that were registered with the county superintendent at the time of the December count. Forms for determining the proportionate share for both preschool and Part B funds have been enclosed with this memo.

The proportionate share is based on the total number of IDEA-eligible private school children with disabilities who were living/residing in the LEA's boundaries at the time of the December 1, 2002, child count. When calculating the proportionate share, IDEA-eligible private school students are defined as those students who, at the time of the December 1, 2002, child count, were between the ages of 5 and 19 (5 through 18, inclusive).

In Montana, regular public education is not provided for children ages 3 and 4 or for children who do not turn 5 on or before September 10 of the school year. The LEA is obligated to make free, appropriate public education (FAPE) available for all eligible preschool children with disabilities beginning on the child's third birthday and through age 5. The LEA meets its full obligation to this age group through the IEP.

***Because public education is not provided for students ages 3 and 4, and for those who do not turn 5 on or before September 10 of a school year, there is no requirement to provide special education and related services under a service plan to this same age group of children who are unilaterally placed by their parents in preschool settings.***

To help ensure compliance with the requirements under IDEA for serving parentally placed IDEA-eligible school-age children enrolled in private schools (includes home schools that are registered with the County Superintendent's office), questions regarding the number of such eligible children, the services to be provided and the manner in which consultation with private schools representatives was conducted, have been added. It is necessary that each of the questions be answered and that for each district participating in the application the number of IDEA-eligible students with disabilities parentally placed in private schools, and counted on December 1, 2002, be reported. It is important to note that this count includes eligible students served and those not receiving special education services through a Services Plan.

### III. THE PART B AND PRESCHOOL APPLICATION AND PROCEDURE FOR SUBMISSION

Again this year, the Part B and Preschool grant applications have been consolidated into a single application. However, in order to address differing program requirements, you must prepare separate budgets for Part B and Preschool entitlement funds. Separate budget forms have been included as part of the application.

Project budget forms include a line item for indirect costs. Applicants who are special education cooperatives should not budget funds in the indirect cost line item because all costs related to operation of the cooperative are considered direct costs. If the applicant is a school district, allocations may be budgeted for indirect costs if the district has an Office of Public Instruction approved indirect cost rate for fiscal year ending June 30, 2004. The indirect cost calculation is provided for you on the back of the budget sheets. Questions regarding approved indirect cost rates should be directed to Jim Oberembt, GAAP Accounting, at 444-1257.

Allocations should be budgeted as follows:

- salaries and benefits,
- operating expenses,
- indirect costs (not for special education cooperatives),
- equipment (with a unit cost of \$5,000 or more), and
- transfer to other districts (to be used for consolidated applications, as appropriate).

The procedure for completing the budgets is as follows:

- Refer to the FY '04 allocations report provided with the application for the "estimated" current-year Part B and Preschool funds available.
- Complete the "proposed budget" column on each budget form (Preschool and Part B), allocating the total amount of funds into appropriate line items.
- If purchasing equipment, identify the total amount of funds to be expended for equipment that has a per unit cost of \$5,000 or more.
- If budgeting indirect costs, use the formula for calculation as shown on the back of the budget page.

It is important to remember that equipment items must be preapproved. Line item transfers cannot be made into the equipment line item without prior approval.

The allocations report included with your application is based on an estimate of FY '04 current-year funds. If the final allocation amount differs from the estimated amount included with this application packet, the OPI will revise your budgets to reflect the final allocation figure. You may transfer funds between line items in the budget without the OPI approval.

When the OPI receives your final fiscal reports for FY '03 Part B and Preschool projects (project period 7/1/02-6/30/03), we will calculate the amount of unexpended FY'03 funds, report this figure to you and add the amount to your already approved FY '04 project(s). These funds will be identified as FY '03 carry-over. The amount of carry-over cannot be determined until the applicant submits final fiscal reports. Therefore, it is critical that final fiscal reports for FY '03 projects are submitted to the OPI on or before

August 10, 2003. **Please note that reimbursements requested on final fiscal closeouts received after August 10, 2003, will not be reimbursed by the OPI.**

The project period for the FY '04 projects (that will include both carry-over and current-year funds) will be July 1, 2003 - June 30, 2004.

#### IV. USE OF ALLOCATIONS

##### PART B FUNDS

Section 613 of IDEA describes allowable uses of Part B funds by LEAs. It states in part:

(2) USE OF AMOUNTS.--

“(A) IN GENERAL.--Amounts provided to the local educational agency under this part shall be expended in accordance with the applicable provisions of this part and--

“(i) shall be used only to pay the excess costs of providing special education and related services to children with disabilities;

“(ii) shall be used to supplement State, local, and other Federal funds and not to supplant such funds; and

“(iii) shall not be used, except as provided in subparagraphs (B) and (C), to reduce the level of expenditures for the education of children with disabilities made by the local educational agency from local funds below the level of those expenditures for the preceding fiscal year.

“(B) EXCEPTION.--Notwithstanding the restriction in subparagraph (A)(iii), a local educational agency may reduce the level of expenditures where such reduction is attributable to--

“(i) the voluntary departure, by retirement or otherwise, or departure for just cause, of special education personnel;

“(ii) a decrease in the enrollment of children with disabilities;

“(iii) the termination of the obligation of the agency, consistent with this part, to provide a program of special education to a particular child with a disability that is an exceptionally costly program, as determined by the State educational agency, because the child--

“(I) has left the jurisdiction of the agency;

“(II) has reached the age at which the obligation of the agency to provide a free appropriate public education to the child has terminated; or

“(III) no longer needs such program of special education; or

“(IV) the termination of costly expenditures for longterm purchases, such as the acquisition of equipment or the construction of school facilities.

“(C) TREATMENT OF FEDERAL FUNDS IN CERTAIN FISCAL YEARS.--

(i) Notwithstanding clauses (ii) and (iii) of subparagraph (A), for any fiscal year for which amounts appropriated to carry out section 611 exceeds \$4,100,000,000, a local educational agency may treat as local funds, for the purpose of such clauses, up to 20 percent of the amount of funds it receives under this part that exceeds the amount it received under this part for the previous fiscal year.

“(ii) Notwithstanding clause (i), if a State educational agency determines that a local educational agency is not meeting the requirements of this part, the State educational agency may prohibit the local educational agency from treating funds received under this part as local funds under clause (i) for any fiscal year, only if it is authorized to so by the State constitution or a State statute.

“(D) SCHOOLWIDE PROGRAMS UNDER TITLE I OF THE ESEA.--Notwithstanding subparagraph (A) or any other provision of this part, a local educational agency may use funds received under this part for any fiscal year to carry out a schoolwide program under section 1114 of the Elementary and Secondary Education Act of 1965, except that the amount so used in any such program shall not exceed--

“(i) the number of children with disabilities participating in the schoolwide program; multiplied by

“(ii)(I) the amount received by the local educational agency under this part for that fiscal year; divided by

“(II) the number of children with disabilities in the jurisdiction of that agency.”

Section 611 (f)(3) of IDEA, states in part, that funds made available to LEAs for capacity-building and improvement shall be used for the following purposes:

...to assist them in providing direct services and in making systemic change to improve results for children with disabilities through one or more of the following:

“(i) Direct services, including alternative programming for children who have been expelled from school, and services for children in correctional facilities, children enrolled in State-operated or State-supported schools, and children in charter schools.

“(ii) Addressing needs or carrying out improvement strategies identified in the State's Improvement Plan under subpart 1 of part D.

“(iii) Adopting promising practices, materials, and technology, based on knowledge derived from education research and other sources.

“(iv) Establishing, expanding, or implementing interagency agreements and arrangements between local educational agencies and other agencies or organizations concerning the provision of services to children with disabilities and their families.

“(v) Increasing cooperative problemsolving between parents and school personnel and promoting the use of alternative dispute resolution.

## PRESCHOOL FUNDS

Preschool funds shall be used only to provide special education and related services in accordance with section 619 of IDEA to eligible children with disabilities aged 3 through 5, inclusive.

### V. APPLICABLE STATUTES AND CAUTIONS

#### **§300.3 Regulations that apply.**

The following regulations apply to this program:

- (a) 34 CFR part 76 (State-Administered Programs) except for §§76.125—76.137 and 76.650—76.662.
  - (b) 34 CFR part 77 (Definitions).
  - (c) 34 CFR part 79 (Intergovernmental Review of Department of Education Programs and Activities).
  - (d) 34 CFR part 80 (Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments).
  - (e) 34 CFR part 81 (General Education Provisions Act— Enforcement).
  - (f) 34 CFR part 82 (New Restrictions on Lobbying).
  - (g) 34 CFR part 85 (Government-wide Debarment and Suspension (Nonprocurement) and Government-wide Requirements for Drug-Free Workplace (Grants)).
  - (h) The regulations in this part—34 CFR part 300 (Assistance for Education of Children with Disabilities).
- (Authority: 20 U.S.C. 1221e-3(a)(1))

### VI. IDEA PART B AND PRESCHOOL FUND EXPENDITURES

Funds provided under Part B may only be used for supplementing the special education program needs of eligible students under IDEA. Expenditures of Part B funds must be made in accord with the requirements under Section 613 of IDEA, Local Educational Agency Eligibility, and accounted for in accord with Office of Public Instruction policies and accounting procedures.

Preschool funds may only be used for provision of services and activities relative to eligible children under IDEA ages 3 through 5, inclusive. The funds must be accounted for in accord with Office of Public Instruction accounting policies and procedures. Please refer to the *Montana Federal and State Grants Handbook*.

### VII. PROGRAM NARRATIVES

In order to ensure that your Program Narratives on file with our office contain your currently used special education forms, it will be necessary for you to submit a copy of your forms with your completed application. In addition, if your program has made any revisions to its special education policies within the past year, it will be necessary to submit a copy of the revised policy along with your application.

It is important to remember, in the case of special education cooperatives, participating districts within the cooperative are required to comply with the policies stated in the Program Narrative that is on file in our office. Questions regarding the Program Narrative should be addressed to Marlene Wallis at 406-444-2504, or Marilyn Pearson at 406-444-4428.

### VIII. MAINTENANCE OF EFFORT (MOE)

The applicant should refer to the enclosed maintenance of effort (MOE) report when completing the MOE information for FY '02 in the project application (refer to #4 (a) on the front page of the application).

If it has been determined by the OPI that an applicant has not maintained effort, the OPI will send a letter to the applicant informing the applicant that MOE has not been maintained, the basis on which the decision has been made and the right of the applicant to a hearing. The notice will also inform the applicant of the procedures to be followed if Part B funds must be withheld. Questions regarding MOE should be directed to Marilyn Pearson at 444-4428.

**THE COMPLETED GRANT APPLICATION MUST BE SUBMITTED TO THE OFFICE OF PUBLIC INSTRUCTION BY JUNE 27, 2003.**

Please be sure that **all required areas** of your application are complete. Incomplete applications cannot be approved.

Questions regarding this memorandum or the management of IDEA Part B or Preschool funds should be directed to Marlene Wallis, Administrative Officer, at 444-2504, or Marilyn Pearson, Assistant Director of Special Education, at 444-4428.

Questions regarding accounting procedures for Part B or Preschool should be directed to Madilon Beatty, OPI Accounting Specialist, at 444-4403.

Enclosures

cc: Business Managers/Clerks



Linda McCulloch, Superintendent  
Office of Public Instruction  
Division of Special Education  
PO Box 202501  
Helena, Montana 59620-2501  
www.opi.state.mt.us

**APPLICATION/AMENDMENT FORM**  
**Federal Funds Under**  
**Individuals with Disabilities Education Act**  
**Due to OPI: June 27, 2003**

**FUNDING AUTHORITY**  
IDEA-B Flow-Through  
CFDA #84.027A  
IDEA Section 619 Preschool  
CFDA #84.173A

**PART I—PROJECT APPROVAL STATISTICAL DATA AND ABSTRACT**

**1. Prime Applicant:**

District/Cooperative Name	District No.	County	Legal Entity
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**2. Project Director:**

Name	Position	Address	ZIP	Telephone
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**3. The Board of Trustees has designated the following person responsible for keeping the financial records for this project.**

Name	Position	Address	ZIP	Telephone
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**4. Maintenance of Fiscal Effort (Sec. 300.231)**

Complete (a) and (b). Refer to the maintenance of effort report provided to you by the OPI for FY '02 (school year 01-02).

(a) 01-02 school year expenditures—

Total amount of state and local funds expended for special education.

Total \$ \_\_\_\_\_

(b) 03-04 ensuing school year budget—

Total amount of state and local funds budgeted for special education [300.231(c)].\*

Total \$ \_\_\_\_\_

\*If the applicant is budgeting less than the amount expended in school year 01-02, the applicant must provide an explanation for the reduction. Reductions must be in compliance with 300.232 and/or 300.233.

**5. Statement of Assurances**

The Board of Trustees submitted a Common Assurances form to the Office of Public Instruction in spring 2002 and no circumstances affecting the validity of the assurances have changed since its submittal.

Signature—Designated Authorized Representative for the IDEA Part B/Preschool Program Applications	Date
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## PART II—CONSOLIDATED APPLICATIONS

### 1. List all participating districts.

District

County

2. ☐ Check here if a cooperative has adopted a clause in its interlocal agreement that empowers the cooperative to apply for Part B and Preschool funds on behalf of member districts.

If there is no such clause in the interlocal agreement, all member districts other than the prime applicant must complete number 3, page 3, "Participating Districts Other Than Prime Applicant District—Statement of Assurances."

### 3. Participating Districts Other Than Prime /Applicant District—Statement of Assurances

If there is no clause in the interlocal agreement that empowers the applicant to apply for Part B and Preschool funds on behalf of participating districts, this form must be completed and signed by the chairperson of the Board of Trustees for each district (other than the prime applicant district) participating in this project application.

School District No.:

County:

School Name:

☐ Elem

☐ HS

#### CERTIFICATION

- A. The Board of Trustees of the above-named school district in a meeting held on \_\_\_\_\_  
Month Day Year  
authorized \_\_\_\_\_ to file an application for the district to make  
Name of Authorized Representative  
representations, and to make commitments on behalf of the district under the provisions of the  
Individuals with Disabilities Education Act, as amended by P.L. 105-17, and the Department of  
Education's General Administrative Regulations (EDGAR).
- B. The Board of Trustees further agrees that the district named in item C is designated the administrative and fiscal agent for the project and is authorized to receive and expend, for the conduct of this project, funds belonging to the above district in the amount not to exceed that which is approved for the district by the Superintendent of Public Instruction.
- C. The district or county superintendent designated administrative and fiscal agent for the project is:

School District Name

Number

☐ Elementary School

☐ High School

OR

County Superintendent Name

County

- D. The Board of Trustees has reviewed all information and data contained in this application and has approved the project for submission to the Office of Public Instruction.

Signature—Chairperson of the Board of Trustees

Date

### PART III—LOCAL EDUCATION AGENCY PROGRAM DATA

Each participating district within the cooperative or consolidated application that is eligible to receive a Part B entitlement must complete the information on pages 4 and 5.

#### A. **Maintenance of Fiscal Effort** (Sec. 300.231)

Complete (a) and (b). Refer to the maintenance of effort report provided to you by the OPI for FY '02 (school year 01-02).

1. 01-02 school year expenditures—  
Total amount of state and local funds expended for special education.

Total \$ \_\_\_\_\_

2. 03-04 ensuing school year budget—  
Total amount of state and local funds budgeted for special education.

Total \$ \_\_\_\_\_

#### B. **Private School Information** (Sec. 300.450-300.462)

1. Describe how the district consulted with representatives of private school children to decide which children will receive services, what services will be provided, and where the services are to be provided.

2. Identify the total number of parentally placed IDEA-eligible students with disabilities residing within the district and attending private schools, **age 5**, on December 1, 2002. (This should include students receiving services **and** students identified as IDEA-eligible but not receiving services through a Services Plan.)

\_\_\_\_\_

3. Identify the total number of parentally placed IDEA-eligible students with disabilities residing within the district and attending private school, **between the ages of 5 and 19**, on December 1, 2002. (Include students receiving services **and** students identified, but not receiving services through a Services Plan.)

\_\_\_\_\_

4. Identify the special education services to be provided (e.g., speech, special education teacher consultative services).

5. Identify the location of where the services will be provided (e.g., at the public school).

C. Assurance is made by the \_\_\_\_\_ that it provides  
School District Name  
special education and related services in accord with the policies and procedures contained in the Program Narrative submitted to the Office of Public Instruction in spring 2001.

Signature—Authorized School Representative

## **PART IV—EQUIPMENT (PART B)**

The applicant must identify each piece of equipment with a per unit cost of \$5,000 or more that the applicant intends to purchase with project funds. Additionally, the applicant must provide a detailed justification for the purchase of each equipment item.

### **Equipment Item:**

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### **Justification for Equipment Purchase:**

## **PART IV—EQUIPMENT (PRESCHOOL)**

The applicant must identify each piece of equipment with a per unit cost of \$5,000 or more that the applicant intends to purchase with project funds. Additionally, the applicant must provide a detailed justification for the purchase of each equipment item.

### **Equipment Item:**

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### **Justification for Equipment Purchase:**



Linda McCulloch, Superintendent  
Office of Public Instruction  
Division of Special Education  
PO Box 202501  
Helena, Montana 59620-2501  
www.opi.state.mt.us

# The Individuals with Disabilities Education Act (IDEA) Part B – Annual Project Budget 2003-2004

CFDA #84.027A

## CONTINGENT UPON AVAILABILITY OF FEDERAL FUNDS

The budget period is July 1-June 30. Amendments to this budget may occur up to project close-out, but no later than June 30.

Prime Applicant District: \_\_\_\_\_ Legal Entity: \_\_\_\_\_ Project Number: \_\_\_\_\_

Budget Items	Proposed Budget	Approved Budget 1	Approved Budget 2	Approved Budget 3
1. Salaries and Benefits Objects 1xx, 2xx				
2. Operating Expenses Objects 3xx, 4xx, 5xx, 6xx, 8xx				
3. SUB-TOTAL DIRECT COSTS				
4. Indirect Costs @ _____% (See back for directions.)				
5. Equipment (\$5,000 or more per unit) Attach Details and Justification Object 7xx				
6. Transfer to other districts 6200-930				
7. TOTAL BUDGET				
OPI Use Only: Approved by/Date				

### OPI Use Only

#### FY '03 Carryover Funds

Date	Amount	Initials

#### FY '04 Current Year Funds

Date	Description	Amount	Initials
	Allocation		
	Allocation		

For assistance, contact Marlene Wallis at 444-2504.

### **INSTRUCTIONS**

1. Use whole dollar amounts only.
2. The district person responsible for accounting should be given a copy of the budget and personnel pages.
3. A district/cooperative may expend up to 10 percent over a budgeted line item WITHOUT OPI approval.
4. All instructional supplies and equipment approved for purchase with these funds must be ordered 90 days prior to close of project.
5. Last date to amend this budget is 30 days prior to close of project.





Linda McCulloch, Superintendent  
Office of Public Instruction  
Division of Special Education  
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# The Individuals with Disabilities Education Act (IDEA) Preschool – Annual Project Budget 2003-2004

CFDA #84.173A

## CONTINGENT UPON AVAILABILITY OF FEDERAL FUNDS

The budget period is July 1-June 30. Amendments to this budget may occur up to project close-out, but no later than June 30.

Prime Applicant District: \_\_\_\_\_ Legal Entity: \_\_\_\_\_ Project Number: \_\_\_\_\_

Budget Items	Proposed Budget	Approved Budget 1	Approved Budget 2	Approved Budget 3
1. Salaries and Benefits Objects 1xx, 2xx				
2. Operating Expenses Objects 3xx, 4xx, 5xx, 6xx, 8xx				
3. <b>SUB-TOTAL DIRECT COSTS</b>				
4. Indirect Costs @ _____% (See back for directions.)				
5. Equipment (\$5,000 or more per unit) Attach Details and Justification Object 7xx				
6. Transfer to other districts 6200-930				
7. <b>TOTAL BUDGET</b>				
<b>OPI Use Only: Approved by/Date</b>				

## OPI Use Only

### FY '03 Carryover Funds

Date	Amount	Initials

### FY '04 Current Year Funds

Date	Description	Amount	Initials
	Allocation		
	Allocation		

For assistance, contact Marlene Wallis at 444-2504.

### **INSTRUCTIONS**

1. Use whole dollar amounts only.
2. The district person responsible for accounting should be given a copy of the budget and personnel pages.
3. A district/cooperative may expend up to 10 percent over a budgeted line item WITHOUT OPI approval.
4. All instructional supplies and equipment approved for purchase with these funds must be ordered 90 days prior to close of project.
5. Last date to amend this budget is 30 days prior to close of project.

**IDEA Part B**  
*Proportionate Share Calculation Form*  
**(Montana Private Schools Form D)**

**School District:** \_\_\_\_\_

**Date:** \_\_\_\_\_

To calculate the amount of IDEA Part B funds that must be allocated for services to parentally placed IDEA-eligible children with disabilities in private schools for school year 2003-2004, the district must compile these factors. The annual child count, taken on December 1, 2002, is the basis for calculating this proportionate share. When calculating the proportionate share, IDEA-eligible private school students are defined as those students who, at the time of the December 1, 2002, child count, were between the ages of 5 and 19 (5 through 18, inclusive). If a school district provided regular education to 19, 20, and 21 year-old students who had not graduated from high school, the school district must calculate the proportionate share for same-age parentally placed IDEA-eligible students with disabilities in private schools that provide educational opportunity for students of that age range.

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**STEP 1:** In order to perform an accurate proportionate share calculation, complete the following:

- A. Total number of parentally placed IDEA-eligible students with disabilities residing within the district and attending private school, **between the ages of 5 and 19**, on December 1, 2002. (Include students receiving services **and** students identified, but not receiving services through a Services Plan.) \_\_\_\_\_
- B. Total number of IDEA-eligible students with disabilities attending public school **between the ages of 5 and 19**, on December 1, 2002. \_\_\_\_\_
- C. Total number (A + B) of IDEA-eligible students with disabilities residing in the district **private and public schools between the ages of 5 and 19**, on December 1, 2002. \_\_\_\_\_
- D. **Total Part B Allocation Amount for the District** \$ \_\_\_\_\_
- 

**STEP 2:** Using A, C, and D above, complete the formula below by entering the values that correspond to the subscript below each blank.

\_\_\_\_\_ divided by \_\_\_\_\_ multiplied by \_\_\_\_\_ = \$ \_\_\_\_\_  
Value for A                      Value for C                      Value for D                      Constitutes Proportionate Share

**It is recommended that each school district maintain a copy of this calculation for their records.**

**IDEA Preschool**  
*Proportionate Share Calculation Form*  
**(Montana Private Schools Form D)**

**For School District:** \_\_\_\_\_

**Date:** \_\_\_\_\_

To calculate the amount of Preschool funds that must be allocated to parentally placed IDEA-eligible children with disabilities in private schools for the 2003-2004 school year, the district must compile these factors. The annual child count, taken on December 1, 2002, is the basis for calculating this proportionate share. When calculating the proportionate share for preschool, include only those children who were 5 years of age on December 1, 2002. *The calculation should not include parentally placed IDEA-eligible children with disabilities in private schools that were 3 or 4 years of age on December 1.*

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**STEP 1:** In order to perform an accurate proportionate share calculation, complete the following:

- A. Total number of parentally placed IDEA-eligible students with disabilities residing within the district and attending private schools, **age 5**, on December 1, 2002. (This should include students receiving services **and** students identified as IDEA-eligible but not receiving services through a Services Plan.) \_\_\_\_\_
- B. Total number of IDEA-eligible preschool-age students with disabilities attending public school, **age 3 through 5**, on December 1, 2002. \_\_\_\_\_
- C. Total number (A + B) of IDEA-eligible students with disabilities residing in the district attending **private and public** schools on December 1, 2002. \_\_\_\_\_
- D. **Total Preschool Allocation Amount for the District** \$ \_\_\_\_\_
- 

**STEP 2:** Using A, C, and D above, complete the formula below by entering the values that correspond to the subscript below each blank.

\_\_\_\_\_ divided by \_\_\_\_\_ multiplied by \_\_\_\_\_ = \$ \_\_\_\_\_  
Value for A                      Value for C                      Value for D                      Constitutes Proportionate Share

**It is recommended that each school district maintain a copy of this calculation for their records.**